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ABSTRACT

The 80 loan officers in a commercial banking division provided data about their writing on the job. The data were collected during interviews and with a questionnaire. The executives reported no specific training for the writing they did. The bank did not offer any guidelines or training courses for performing job-related writing tasks, assuming that people qualified for executive positions had good writing skills. Writing was considered an extremely important aspect of the subjects' jobs, comprising an estimated 20% of the work scheduled and it was used as a factor for promotions. All the executives agreed that writing contributed to the bank's image with its customers and to the writer's image with colleagues and superiors. The two main goals of business writing were considered to be efficiency and effectiveness. As a result of these findings, six recommendations were made to college business writing instructors. These recommendations included emphasizing the importance of the writer's sense of audience, developing analytical thinking skills, making students aware of available composing strategies for particular writing tasks, teaching students how to write summaries, organizing written materials to suit audience needs, and demanding accuracy and clarity in student writing. (RL)

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ON-THE-JOB WRITING OF HIGH-LEVEL BUSINESS EXECUTIVES: IMPLICATIONS FOR COLLEGE TEACHING

As a manuscript editor of nonfiction books, I spent much of my time reorganizing and rewriting entire manuscripts for publication. During this work I was continually struck by the apparent difficulty many authors had organizing their thoughts and expressing them clearly for their intended audiences. These were all people who had had excellent formal educations, who were acknowledged experts in their fields, and who had contracts with the publishing house. At the same time, I began noticing that my husband's business associates--executives in varied fields--were complaining about the writing in their companies. They often actually had trouble understanding each other's written communications. All this evidence led me to the conclusion that there exists a gap between the kind of writing taught in colleges and universities and the kind of writing that is required in business and industry. I became interested in learning how to bridge that

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gap, and, as a result, I have been conducting research on writing in the business world. My talk today will present some of the key findings of that research and will draw implications that, I hope, will be useful to those of you who are preparing students to enter careers in business and industry.

My initial goals for this research were to discover what, why, and how executives write for their jobs, and, if possible, to discover what their attitudes and needs are concerning the writing tasks they perform. My subjects were loan officers in the commercial banking division of a large Northeastern bank; it is their job to sell the bank's lending services to other businesses, both local concerns and large national corporations.

The first phase of the study consisted of one- to two-hour personal interviews with ten executives, in which we discussed the various writing tasks they perform, how they approach these tasks, and what problems they have executing them. From these interviews, and from an examination of all kinds of written communications in the bank's central files, I constructed a taxonomy of the writing tasks, which I have condensed for you in the hand-out. As you will see, I have separated the tasks into two main groups: those which have an internal audience--that is, communications within the bank--and those which have an external audience--in other words, communications

with the bank's clients. There may be some terminology on the hand-out with which you are unfamiliar, but I hope to clarify it as we proceed.

The second phase of the study consisted of responses to an eight-page voluntary, anonymous questionnaire that I designed and distributed to all eighty loan officers in the commercial banking division. Through this questionnaire I sought to confirm or dispell the impressions I had received from the personal interviews; I hoped to gain insight into the composing processes of these executives as well as to discover what the bank might do to improve its written communications systems. The questions covered three main categories: questions concerning previous and current training in writing; questions about the importance of writing to the respondents' success as loan officers; and questions about the specific composing methods and technological systems each respondent uses.

I have selected ten key findings from the study that I think have direct implications for classroom teaching. First, I will enumerate these findings and then I will draw conclusions about the kinds of writing skills I think students should have acquired by the time they graduate from college.

1. These executives report that they had no specific training for the writing they do on the job. While they all took freshman English in college,

they consider that course to be insufficient training for the kinds of writing tasks they face on their jobs.

2. The bank does not offer any guidelines for the writing tasks they perform. As new lending officers, these people must ask colleagues, or a supervisor, or discover from their predecessors' files, how to approach the various writing tasks for the job. Rarely do supervisors offer help or advice on writing.

3. While there are a host of training courses in other fields, there are no training courses in writing offered at the bank. Recently, management has been concerned about improving the poor quality of credit analysts' writing, so twice a year there is a six-session basic writing course for credit analysts, but because many new loan officers do not in fact come up through the Credit Department, they do not benefit from even this brief course.

4. All the lending officers and managers I talked with, as well as the respondents to the questionnaire, consider writing to be an extremely important aspect of their job.

5. These executives estimate that they spend between 15 and 20% of their working hours on writing tasks. Based on the typical executive's work schedule, this means that they spend 400 hours a year, or 10 full work weeks,

on writing tasks alone.

6. At this particular bank, writing is used as a measure of an executive's promotability. Out of eighty loan officers, top management chooses about ten for the fast track and "tests" them for promotion by assigning them substantial research projects, the results of which must be presented to management in writing. These projects are ones that directly affect company policy or the direction of important new business.

7. All the executives agree that writing contributes to the bank's image with its customers as well as to the writer's image with his or her colleagues and superiors. Since people are promoted for good thinking, and writing reflects thinking, it behooves ambitious employees to express their ideas well on paper.

8. The bank assumes that anyone qualified for an executive position also has good writing skills. After all, not only are loan officers responsible for acquiring business through persuasive one-to-one communication with their customers, but they are also responsible for producing the documents on which the bank bases all its lending decisions.

9. The secretary-to-executive ratio is at best one-to-two, and often one-to-three, so most executives are encouraged to use the central word

processing system. Word processing systems are standard at most large companies; they consist of massive tape recording banks and sophisticated transcription machines operated by typists who work on shifts around the clock. The writer dictates into his or her desk telephone receiver, the material is transcribed at the word processing center, and it is returned to the writer some hours or some days later. Obviously, this system saves the company time and money. As John Gould can testify, it is the wave of the future, so college students can no longer assume that when they enter the business world they will be able to rely on the editing services of a personal secretary.

10. There are two main goals of business writing: one, <u>efficiency</u>, for both writer and reader (so brevity is usually key), and two, <u>effectiveness</u>--that is, communicating the intended message clearly and succinctly.

If efficiency and effectiveness are the goals of business writing, how, then, can we help students achieve these goals? I will now summarize what I see as the implications of these findings for college teaching. I must emphasize, however, that what I have discovered in my study supports much of the recent research of such people as Linda Flower and Dick Hayes, Janet

Emig, James Kinneavy, E. D. Hirsch, and Lee Odell--to name only a few. My recommendations, therefore, will merely confirm the kinds of procedures you are already using in the classroom.

First, emphasize the importance of taking one's audience into consideration at all points during the composing process. Give writing assignments that require students to make decisions about content, organization, style, length, tone, and voice based on what is appropriate and useful for the intended readers. Ask students to analyze the function and the audience for each piece of writing so they can see how these two elements are inextricably related.

Second, develop students' ability to think analytically. Students need to know how to break down a problem into its components and analyze them objectively and logically. They should be able to draw inferences and conclusions from their information. Whereas in academic writing one usually makes the most important point at the end of the paper, in business it is usually more effective--and more useful to the reader--to make the important point at the very beginning.

Third, make students aware of different kinds of composing strategies so that they can select an appropriate strategy for a particular task. For

instance, routine business memoranda and correspondence are usually composed with a first-time-final strategy (a term I have borrowed from John Gould); that is, the writer composes a first draft that becomes the final one with only a few minor revisions, if any. However, for more complex correspondence, for proposals, legal documents, and lengthy reports, the writer will go through several drafts before polishing the final one. Students should know how to develop a systematic approach for both a first-time-final strategy (which is what they actually use on examinations) and for a multiple-draft strategy.

Fourth, teach students how to write a summary. Executives frequently complain that their colleagues are too long-winded; by far the most effective memoranda are those which summarize an issue and then, if necessary, spell out the details later. Even with long reports, good business writers summarize the important points first, thus allowing their readers the opportunity to decide whether it's worth their time to read the entire report or whether they are convinced on the basis of the initial summary. To give students practice in writing summaries, I would suggest assigning several one-page papers that force them to focus on the most important elements of an issue.

Fifth, teach students to organize their material to suit their audiences' needs. Again, like the summary, good organization in a piece of writing is

an enormous help to one's readers: it not only saves them time by telling them where to find certain information; it also helps persuade them to adopt the writer's view.

Sixth, demand accuracy and clarity in students' writing, for these are qualities that are valued highly in all business communications. Inaccurate or fuzzy writing can create misunderstanding and can, in many businesses, lead to law suits that cost companies vast sums of money--and can cost the careless writer his or her job. Students should gain practice in careful editing and proofreading. A good way for students to gain such practice is to have them exchange papers and look for errors in each others' work--but this kind of proofreading should, of course, be done only on next-to-final drafts, preferably with students who have been trained in constructive peer collaboration.

Finally, I'd like to recommend to all of you who are preparing students for nonacademic careers an article published in the May-June 1964 issue of the Harvard Business Review entitled "What Do You Mean I Can't Write?" In it, the author, John Fielden, analyzes the requirements of business writing and defines what good business writing really is. He concludes that, and I quote, "By executives' own vote [here he refers to Harvard Business Review subscribers], no aspect of a manager's performance is of greater importance to his success

than communication, particularly written communication" [end quote].

Unfortunately, written communication is the one area in which students are often ill-prepared for their business careers. It is my observation, from my prior job experience as well as from the bank study, that most businesspeople have difficulty writing effectively and efficiently. However, given the exciting new approaches to teaching composition that have evolved from the current research in the field, I believe that we can now teach students those writing and thinking skills that they will need in the business world. Perhaps the biggest challenge will be to teach people who are already established in their careers.

TAXONOMY OF WRITING TASKS PERFORMED BY BANK EXECUTIVES

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External

	Function	Audience	Method of Composition	Role of Revision
1. Simple Letters	acknowledge understanding gained in telephone conversation; document information for client; thank client for business or entertainment (e.g. lunch)	customer	first-time-final strategy; dictated to WP or sec'y	reviewed only for typographical or mechanical errors
2. Complex Letters	explain complex financing terms; turn down request for loan or withdraw existing policy (fail to renew)--i.e., give client unwelcome news	customer	often drafted by hand, typed by sec'y or WP	usually multiple drafts to create desired tone, to present complex information clearly so customer understands all aspects of business transaction
3. Commitment Letters	document loan agreement, committing bank and customer to specific terms; state contingencies of agreement	customer	occasionally form letter with specific details inserted for particular customer, typed by WP; more often custom-tailored, drafted by hand	careful review for accuracy (by writer's supervisor as well as writer); sometimes multiple drafts
4. Proposals	persuade prospective or long-standing customer to use designated bank service(s); explain details of service(s); emphasize selling features	customer	form proposals occasionally used; most proposals prepared individually; drafted by hand, typed by WP or secy	multiple drafts if proposal is customized and lengthy; revised for clarity, accuracy persuasiveness

TAXONOMY OF WRITING TASKS PERFORMED BY BANK EXECUTIVES

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Internal (within bank)

	Function	Audience	Method of Composition	Role of Revision
1. Call Reports	document information gathered from call on customer; record business transacted, implications; remind writer of future action planned; provide background information for other depts. of bank or writer's replacement (new loan cfficer)	wide and varied; potentially unknown: credit files (resource for entire bank), marketing dept., writer's supervisor, occasionally top management, writer's own file	usually first-time-final strategy*; either "spew"* technique or systematic approach, from organized notes; dictated to word processing dept. (WP) or handwritten, typed by sec'y	usually reviewed only for typographical or mechanical errors
2. Simple Memoranda	request other bank services for clients; request information from other depts.; inform colleagues of action affecting another dept.	colleagues in other depts. of bank	first-time-final strategy; usually dictated to WP; sometimes drafted by hand once, then typed by sec'y	revised only for typographical or mechanical errors, or factual inaccuracies
3. Complex Memoranda	persuade supervisor or other colleagues to endorse plan of action or to act on recommendation	supervisor, others in top management	usually drafted by hand, transcribed by sec'y	often revised for focus, impact, tone (multiple drafts),as well as clarity, accuracy
4. Special Reports	investigate, analyze potential area of new business; assess current systems, draw conclusions, usually resulting in major decisions for bank	top management, often chairman of bank: people whom writer must impress favorably	often written as team or task force; handwritten in early draft stages, typed by sec'y; final copy printed and bound for important distribution	long-term project involving multiple drafts; revised for organization, focus, impact, perhaps length, overall presentation
5. Credit Committee Reports	analyze financial health of prospective client; recommend specific lending policy	wide, potentially unknown; Credit Committee; heads of Credit Policy, Loan Review, Int'l Depts., Vice-Chmn. of board and bank, supervisors of all lending divisions	written in sections by credit analyst (exec. trainee); by hand; final draft typed by dept. sec'y	reviewed by loan officer whose client seeks loan; revised for inaccuracies

*terms borrowed from John Gould's research